CAM-I ASIG Assessment Tool Purpose

- **Why we did them**
  - Provide data for the case study
  - Consistency: To make sure our case studies talk about the same things
  - Surveys did not ask specifically address our principles
- **Objectively "rate" PCM initiatives**
  - Ratings allow greater analysis, if desired
  - An analytical way to "down select" initiatives for the blue book

CAM-I ASIG Assessment Tool Parts

- **Maturity Assessment (Part I)**
  - Determines the PCM initiative's stage of maturity under "milestone" and "dynamic" views of Cost Management System Development
- **Guiding Principles Assessment (Part II)**
  - A section of questions/statements for each principle whose ratings determine whether the initiative exhibits that principle
  - An introductory paragraph explains what we mean by the principle
  - Duplication between principles was removed (to reduce confusion)
- **Success Gauge (Part III)**
  - Determines the success by rating whether the initiative met its intended scope and objectives within budget and schedule
  - Identifies which principles contributed to this success

CAM-I ASIG Assessment Tool Outcome

- **Initial goal: See whether our initiatives demonstrated the principles**
- **Current goal:**
  - See whether our initiatives demonstrated the principles (Part II)
  - See whether the principles contributed to success (Part III)
  - Caveat the above by considering maturity (new initiatives are unlikely to demonstrate principles or have any success yet) – Part III
- **Outcomes:**
  - Assessment Tool data becomes foundation for case studies (see next slide)
  - We can choose the right case study for each principle chapter in the blue book (and not discredit any PCM initiative because it is immature)
  - Privacy where organizations want it

CAM-I ASIG Assessment Tool
Link to Case Study Outline (Demonstration)

- **Introduction**
  - Name of organization, description of initiative
  - List of objectives of the implementation (Part III: PCM Success Gauge)
  - List of principles demonstrated by the implementation (Part II: Guiding Principles) (summary of 3 and 4 ratings from assessment)
  - Synopsis of what PCM initiative achieved
- **The Study**
  - General
    - Demographic stuff (Part III and I: PCM Success Gauge, Maturity Gauge) – breadth of implementation (organizations touched), schedule, money spent to date (if not, FTE of team etc), etc. Level of the organization and where the case study fits. (initial scope)
    - Other historical (Part I: Previous PCM Initiatives)
    - What is the intent of the PCM initiative effort (why we want to go to the maturity levels documented in the future state (Part I: Organizational Maturity). What were desired outcomes from objectives?
  - Detail of case study
    - Describe baseline (Part I: Organizational Maturity)
    - Describe your approach to implementing the PCM initiative (what did you do, how did you do it (the recipe).
- **Findings**
  - Relate to guiding principles (Part II: Guiding Principles Assessment), What principles benefited this implementation (3 and 4 ratings).
  - Value to organization
    - What was the success, what was the result of the initiative (did you achieve stated objectives?) (Part III: PCM Success Gauge)
    - What difference did the PCM initiative make? (Part II: Guiding Principles)
  - Lessons learned (this can be related to Part II: Guiding Principles). Look at low rated areas and describe impacts and how changes could lead to improvements
  - Future path (how to achieve desired maturity Part I: Organizational Maturity)

CAM-I ASIG Assessment Tool
Link to Case Study Outline (Demonstration)

- How to write the introduction with the Assessment Tool

Objectives
Please list the primary objectives of the organization's PCM initiative (examples include providing cost visibility, setting appropriate price levels, etc.) and rate the extent to which they are being achieved

Objective	**Rating**	**Contributing Principle**
Objective #1 Cost visibility *Rating Rationale: Can supply ABC model information, but limited demand. Not a component of the business process.*	2	
Objective #2 Performance compliance *Rating Rationale: HQIMA issued Performance Management Review (PMR)/Quarterly Training Brief (QTB) memorandum mandating quarterly performance reviews with results reported to higher headquarters*	3	2/4/5
Objective #3 Productivity Improvement *Rating Rationale: HQIMA Productivity Management Plan requires documentation and reporting of productivity improvements to higher headquarters. Many initiatives and cost savings/avoidance have resulted from this effort. Started process in four directorates and have not expanded to seven directorates*	3	1/2/3/5/7/8

(1) Readiness before Cost

Regardless of whether we are at war or peace, readiness is the primary outcome for the Armed Services. While there is always a cost for achieving a particular level of readiness, lowering costs to maintain that level should result in savings or freed resources for reallocation to other priorities. Alternately, improving work processes can result in a higher level of readiness at the same cost. Performance and cost management provides tools for the identification of potentials for the reduction of costs and permits the optimization of readiness in a constrained cost environment.

When the organization understands the interaction between readiness and cost and uses PCM to optimize readiness given cost constraints, then it is demonstrating the principle of "readiness before cost". Questions to answer/statements to validate to determine whether this is the case include:

Recognition that Readiness and Cost are Intertwined	**Rating**
1. Good resource stewardship is viewed as mission essential (the organization recognizes the potential for improved war-fighter/operational unit support through good business practices) *Rating Rationale: Garrison activities are documenting and reporting productivity improvements on a quarterly basis that include cost savings/avoidance as well as productivity initiatives (customer service, quality, timeliness, customer savings). Any cost savings are reallocated within the function and considered freed resources to be used to support priority readiness requirements.*	4

CAM-I ASIG Assessment Tool
Who has responded (Phase I)

- **Tools Received**
  - Army: Ft. Hood (Lanelle Butts)
  - USCG: ISC San Pedro (Paul Baca)
  - USMC (Gene Bacher):
    - MCAS Yuma
    - Camp Lejeune
  - USAF Air Armaments Center Eglin AFB (Mike McCain)
- **Tools in process**
  - USCG ARSC (John Duff)
  - USCG (Mike Sim)
  - USN (CNI – Brian Wong)

CAM-I ASIG Assessment Tool
Who we'd Like (Phase II)

From Q104 (Chandler):

- **Marine Corps**
  - MCAS Cherry Point
- **Navy (Non-CNI)**
  - SEA Enterprise
  - NAVSEA Shipyards
  - NAVAIR (Bob Misch)
- **Army (Lanelle Butts)**
  - Ft. Bragg
  - Ft. Huachuca
  - Ft. Stewart
- **USAF**
  - Wright Patterson AFB
  - Secretary of the Air Force, Financial Management

From Survey Data:

- **Marine Corps**
  - Beauford Ground Safety
  - MCAS Miramar
- **Navy (Non-CNI)**
  - NAVAIR Jacksonville
  - SPAWAR Systems Center
- **Army?**
  - TACOM?
  - Toole Army Depot?
  - McAlester Ammunition Plant?
- **USAF?**

CAM-I ASIG Assessment Tool Roll Out

- **Phase I**
  - Release to ASIG
  - ASIG members complete and use for the write-up of their case studies
  - Please provide to jason.heung@rgsinc.com by COB June 7th
  - Others complete during CAM-I in room 26
  - Path forward:
    - Assessment Tool is used by case study writers to complete case studies
    - Case study writers are those whose organizations were identified for inclusion in this effort at Chandler
    - Case study drafts are due July 15
  - Case study team will be available to assist. Use the outline presentation to help
- **Phase II**
  - Identify “outside of ASIG” case study candidates from SLS and FLS
  - ASIG members interview these outside organizations using the assessment tool to get the data necessary to write the related case study
- **Phase III**
  - Analysis to determine which cases are used in the blue book
  - A consolidated spreadsheet of answers will be developed at CAM-I and provided to writers